

INFORMATIONAL SERVICE AGENCY RECORDS RETENTION SCHEDULE

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INFORMATIONAL SERVICE AGENCY RECORDS

SG1701. ACCESSION REGISTERS

Information related to library, archives or museum acquisitions. Documentation for book accessions usually includes author, title, publisher, jobber, year purchased, purchase price, and other bibliographic and accession data. Non-book media contain other pertinent information.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed and then destroy.

SG1702. ANNUAL REPORTS

Series provides a record of the primary functional activities and accomplishments of the agency for the previous year. Reports may include narratives, statistics, graphs, diagrams, member lists, descriptions of programs, events and exhibits, and annual financial statements.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed and then destroy.

SG1703. BOARD MEMBER PERSONNEL RECORDS

Series documents the appointment or election and subsequent personnel actions for board members. Records may include appointment letters, résumés, applications, personnel action forms, job descriptions, and employee data sheets.

Retention *Record copy:* Retain by agency for 3 years after final term expires and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1704. BORROWER REGISTRATION RECORDS

Records used to grant citizens library cards and privileges as well as to control circulation of library holdings. Individual borrower registration information may include name, address, telephone number, date of birth, signature, expiration date, identification number and related data.

Retention *Record copy:* Retain by agency until superseded, obsolete or no longer needed and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1705. CATALOGS, FINDING AIDS

Lists which provide patrons with access to library, archives or museum holdings by subject, title, and author and/or donor. Usually includes author's name, title of book or other media, call number, bibliographic description, and related information.

See also SG0016. FINDING AIDS.

Retention *Record copy:* Retain by agency until superseded, obsolete or no longer needed, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1706. CIRCULATION RECORDS

Book cards or electronic records documenting information pertinent to the circulation of materials such as books, magazines, record albums, audio and video tapes, and computer software. May include patron identification, date circulated and date due.

Retention *Record copy:* Retain by agency until transaction is completed and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1707. COPYRIGHT AND REPRODUCTION RECORDS

Series provides a record of the activities, policies and procedures related to copyright ownership and reproduction of agency owned objects and publications, and of the agency's use of items owned by other organizations. Series also documents agreements with other parties for private or commercial use, reproduction, publication and sale of written materials and photographs of agency owned objects and publications. Records may include reproduction, resale and publication policies and procedures, contracts and agreements, use restriction forms, photograph release forms, photographic service request forms, requests for permission to reproduce or publish photographs or documents, fee schedules, correspondence, and work orders for purchase of printed materials.

Retention *Record copy:* Retain by agency for 6 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1708. DIRECTOR'S RECORDS

Series provides a record of the administrative activities of the agency director, such as executive leadership of the organization, financial and personnel management, policy development, budget development and approval, public contact and lobbying. Records may include correspondence, memos, policies, statistical and narrative reports, draft budget data, and financial reports. Series also documents the activities and decisions of the board responsible for governing agency operations or for advising its operations. Records may include minutes, agendas, tape recordings, and board committee records. Records may also include constitution and by-laws, intergovernmental agreements, organization charts, draft and approved budgets.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed, and then destroy.

SG1709. DIVISION ADMINISTRATIVE RECORDS

Series documents the activities, decisions, and reports of administrative staff divisions which oversee or advise programs or functions of the historical agency. Divisions may include, but are not limited to, finance, historic preservation office, historic sites, library, archives, membership, outreach and development, publications, and museum. Records may include division agendas, minutes, proposed budgets, reports and correspondence.

NOTE: Division minutes may become part of agency history which is permanent. See also SG0006. AGENCY WRITTEN HISTORIES

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1710. DEVELOPMENT PROGRAM RECORDS

Series provides a record of administration of the agency's development program. The development program raises funds and other resources for support of the organization and its programs through cultivation of individual, corporate, government and foundation support, and special events. The program also develops, submits and reports on grants. Records may include publicity and promotion records, reports, budgets, grant records, fund raising event and project records, records of gifts in kind and financial donations, mailing lists, bulk mailing records and correspondence.

Retention *Record copy:* Retain by agency for 6 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1711. EDUCATIONAL PROGRAM RECORDS

Series provides a record of administration of the agency's education and public outreach programs. The education program may include tours, lectures, workshops, electronic media, and other adult and children's events and activities. Records may include publicity and promotion records, reports, orientation and training class records, such as teaching packets, brochures, flyers, photographs, audio tapes, videotapes, class schedules, attendance rosters, and correspondence. Records may also include agreements and contracts.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed, and then destroy.

SG1712. EXHIBIT RECORDS

Series documents the planning, development, installation and maintenance of temporary and permanent on-site and off-site exhibitions, research of materials and objects, and publication of exhibits. Records may include exhibit contracts, design and installation records, permanent and temporary exhibit inventory listings, exhibit catalogs, photographs and slides, exhibit scheduling records, brochures, and correspondence.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed, and then destroy.

SG1713. FRIENDS OF THE AGENCY RECORDS

Agency copy of records documenting the activities of non-profit citizens' groups created to promote public support for the archives, library, museum, or other agency activity. Subjects often include programs, costs, acquisitions, special events, policies, procedures, citizen participation, and others. Records may include minutes, agendas, exhibits, by-laws, non-profit statements, membership lists, budget and financial statements, and related materials.

Retention *Record copy:* Retain by agency until superseded, obsolete or no longer needed, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1714. INTER-LIBRARY LOAN RECORDS

Records documenting materials borrowed and loaned by the library through an inter-library loan program in response to patron and other library requests. May include requests, notices, tracking logs, and other records.

Retention *Record copy:* Retain by agency until 6 months after materials returned to owner library, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1715. LOANS AND COLLECTIONS INSURANCE RECORDS

Series documents insurance coverage as part of risk management for museum collections and loan objects. Records may include insurance policies, riders, certificates of insurance, correspondence, damage and loss claims, and reports.

Retention *Record copy:* Retain by agency for 6 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1716. MASTER SHELF LISTS / INVENTORIES

Inventories of all holdings, including volumes and titles added or withdrawn from the collection. Usually arranged by shelf, showing title, author or office, accession number, publisher, date acquired, cost, and number of copies. Used as an inventory control.

Retention *Record copy:* Retain by agency until superseded, obsolete or no longer needed, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1717. MEMBER RECORDS

Series documents administration of the agency's membership program and the status of its membership. Records may include publicity and promotion records, individual member records, membership rosters, reports, membership drive records, mailing lists, address changes, bulk mailing records, and correspondence.

Retention *Record copy:* Retain by agency for 3 years after membership ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1718. OVERDUE BOOK RECORDS

Records used to monitor status of overdue books and other media. Also used to notify patrons to return overdue library materials. Often includes notices and lists. Lists document long overdue materials and can be useful in collection action.

Retention *Record copy:* Retain by agency until materials returned or debts reconciled or deemed un-collectable, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1719. PERMANENT COLLECTION RECORDS

Series documents the accession, use, care, maintenance, storage and disposition of objects in the permanent collection. Series also provide a record of deaccession of objects no longer in the collection. Records may include acquisition and deaccession policies and procedures, appraisal and authenticity records, accession and catalog paper copy and/or electronic catalog records, accession records, deaccession records, deeds of gift, donor records, inventory and location records, condition / conservation records, photographs of objects, conservation records, collections use records, and library shelf lists and finding aids.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed, and then destroy.

SG1720. PUBLICATIONS, PROMOTIONAL

Publications distributed to the public to advertise services, programs, and activities. May include brochures, newsletters, activities calendars, schedules, special events flyers, and other records.

See also SG0033. PUBLICATIONS and SG0011. ELECTRONIC PUBLICATIONS.

Retention *Record copy:* **PERMANENT.** Transfer to State Archives after 3 years.

Duplicate copies: Retain by agency for 3 years or until no longer needed, and then destroy.

SG1721. RESEARCH INQUIRY AND RESPONSE RECORDS

Series provides a record of research requests received and responses made to them by society staff. Records may include written or electronic inquiries and responses. Information may include name of researcher, subject of inquiry or request, and reply.

Retention *Record copy:* Retain by agency for 2 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1722. TEMPORARY LOAN RECORDS

Series documents the processing and documentation of incoming objects loaned from outside sources and objects being loaned out from the permanent collection. Records may include loan requests and agreements, facilities reports, insurance records, descriptions of objects received or loaned out, inspection and conditions reports, acknowledgments and receipts, lender lists, inventory listings, packing and shipping records, damage reports, and insurance reports. Records may also include U.S. and foreign customs forms.

Retention *Record copy:* Retain by agency for 3 years or until administrative need ends, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

SG1723. VOLUNTEER RECORDS

Series documents the administration of the agency's volunteer and intern programs. Records may include recruitment and selection records, volunteer personnel and intern personnel information forms, intern agreements, volunteer and intern time records, emergency notification forms, publicity records, insurance documentation, and correspondence.

Retention *Record copy:* Retain by agency for 3 years after volunteer leaves the program, and then destroy.

Duplicate copies: Retain until no longer needed and then destroy.

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